Logistics EDI IPT   May 5. 1999
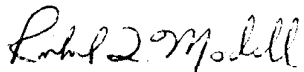
MEMORANDUM FOR: DISTRIBUTION

SUBJECT: Adoption of Commercial ED1 Standards for DoD Logistics Business
         Transactions - Integrated Product Team (IPT)

    The next meeting of subject IPT will commence at 0800 on May 27, 1999 at the
Logistics Management Institute (LMI), McLean, VA. The tentative agenda is provided
below (see Web site www.log.edi.migration.hq.dla.mil for administrative details).
Attached for your review and comment are draft minutes and actions that resulted from
the April 22, 1999 meeting. Subject to comment, the IPT Chairman will approve these
minutes and actions on May 27, 1999. Point of contact is Mr. George Kingsley, (703)
7074068, george_kingsley@hq.dla.mil.

Tentative Agenda:

Information Briefings	Decision Topics
• Implementation Plan Review (Discussion of Gaps and Issues)	
• EDI Policy Status	
• Chairman Updates Actions	

RICHARD L. MODELL
Lt Col, USAF
IPT Chairman

Attachments:
1. Minutes of Meeting
2. Attendees
3. Action Items

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Director, Joint Electronic Commerce Program Office (CTC), (PTI)

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Minutes
Adoption of Commercial EDI Standards for DoD Logistics Business Transactions
Integrated Product Team (IPT), April 22, 1999

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The meeting commenced with the Chairman thanking everyone for attending, administrative announcements, introductions, and a review of the agenda.

Defense Information Systems Agency (DISA) Electronic Business Server (EBS) and the Electronic Commerce Warehouse (ECW): The Inter-National Research Institute, Inc. opened the meeting with a capabilities overview of the DISA, EBS and ECW. The purpose of the briefing was to illustrate for the IPT capabilities that are now in place to support the proposed Defense Logistics Management System (DLMS) implementation. The DISA EBS has been operational since 1996 and is satisfying the following Electronic Commerce (EC) Electronic Data Interchange (EDI) requirements:

- Communications interfaces
- Message processing
- High throughput
- Message audit-ability
- Security
- Reliability
- Translation (since 1998)

DISA and the Defense Automatic Addressing System Center (DAASC) are presently passing data via User-Defined Format (UDF) or American National Standards Institute (ANSI) Accredited Standards Committee (ASC) X12 EDI format standards. Although the software/hardware used by the two Agencies differs, the functionality is complementary. The briefer stated that DAASC would soon be initiating use of Mercator translation software/hardware that is in line with the DISA EBS.

The ECW portion of the briefing opened with a review of definitions and was followed by a demonstration of the retrieval capabilities inherent to this capability. There were several issues raised during this portion of the briefing; concern was expressed that the data displayed may not be synchronized with the data owner; the IPT requested a copy of the rules explaining how access to the ECW can be obtained; finally, security was discussed in detail. The IPT expressed concern that the composite data capability of the ECW may have security ramifications. The briefing and demonstration ended with the Chairman thanking the briefer for a very informative presentation. He suggested that for clarification, DISA might want to provide a "ECW white paper" to the IPT membership. In light of the above issues, this paper would outline the background, current capability, applicability (who, what, when, where, etc.), and what the vision of the future for this capability is, to include security ramifications.

Implementation Plan Action Group Breakout Sessions:

- The Chairman began by providing copies of the "Skeleton Draft" and reviewing the process of developing the Implementation Plan. The next step is to publish a "First Draft Implementation Plan". The Chairman proposed that after the "action groups"

have an opportunity to review, discuss, and formulate a plan of action for their sections, the following schedule would be followed:

Schedule

Step 1: April 30, 1999 - Action Groups provide "best and final" to Logistics Management Institute (LMI) for consolidation.
Step 2: May 7, 1999 – LMI provide consolidated version (1) to all IPT members for review and comment.
Step 3: May 14, 1999 – IPT members provide comments to LMI for consolidation.
Step 4: May 21, 1999 – LMI provide consolidated version (2) to all IPT members in preparation for next IPT meeting.
Step 5: May 27, 1999 – Conduct IPT meeting to identify and resolve outstanding issues before DoD-wide staffing.

- At this point, the IPT membership moved to "breakout sessions".

- At the conclusion of the breakout sessions, each "action group" reported that they were in position to support the above schedule. After some discussions regarding specific (minor) recommendations, the Chairman suggested that these recommendations be held until the IPT has an opportunity to review the next iteration (May 7, 1999) of the plan. The floor was opened for broader issues/discussions:

  - **Plan scope**: The Chairman stated that this is a recurring concern of the IPT and that, to be successful, the IPT must resolve this issue. DRID #48 specifically deals with the adoption of commercial electronic data interchange (EDI) standards. It further states that the plan shall identify a phased implementation approach to migrate the Department's logistics transactions to the use of ANSI ASC X12 EDI standards, or other commercial EDI standards identified in Federal Information Processing Standards (FIPS) 161-2. The scope of the implementation plan is limited to EDI standards approved for federal use; however, it does not exclude component use of other data interchange/data sharing techniques. To this end, the IPT has recognized the need for brokering corporate-wide business rules for other information exchange techniques. These other information exchange techniques will be mentioned in the plan, but are not the primary objective of the IPT or the ultimate implementation plan.

  - **Automatic identification technology (AIT)**: After an extended discussion on the applicability of AIT to this effort, the Chairman agreed to have an EDI/AIT information paper developed. This paper will explore the "what, when, who, how, and why" of AIT EDI development and implementation. Finally, this paper will provide a recommendation on how the IPT should proceed in light of ongoing AIT development within DoD.

  - **Fundamental DLMS briefing**: The IPT requested that a fundamental DLMS briefing be given at the next meeting. This briefing should focus on what is in

place today to support the Services and Agencies in their efforts to implement DLMS. In addition, it should outline what is involved when implementing DLMS into a new logistics business system or one being modernized/updated.

- **DLMS security recommendation**: Finally, the IPT requested that a security recommendation be developed for the use of DLMS. There was concern that DLMS data (example: blood, specific type repair parts, ammunition, etc.), especially when aggregated, could be used to the advantage of anyone needing information regarding operational issues within DoD. The Chairman agreed to develop this recommendation for consideration at the next IPT meeting.

Office of Secretary of Defense (OSD) EDI Policy: The Chairman provided an update of the ongoing process to finalize the OSD EDI policy. After several iterations, starting in January 1999 with the IPT developed draft, the policy is now being informally staffed with the Logistics Information Board (LIB) and the Electronic Business (EB)/Electronic Commerce (EC) Advisory Group. The next step is the incorporation of comments and presentation at the May LIB. The Chairman stressed to the IPT membership the importance of working closely with their LIB and EB/EC Advisory Group members to ensure their thoughts and concerns were included in the responses. It was estimated that the formal staffing process would begin mid-May 1999 with comments expected in June 1999. The Chairman stated that he would continue to serve as the IPT advocate for this process and understood the concerns of the IPT that publishing this policy is critical to the success of this effort.

EDI Prototype Funding Nominations: The Chairman opened this discussion by stating that the IPT EDI project funding evaluation process for FY99 nominations was completed. Five projects are approved pending release of the funding; Third Party Support for Maintenance; Joint Ammunition Management Standard System; Cargo Movement Operations System; Automated Material Safety Data Sheets; Supply Chain Logistics of Repairable Items. He emphasized that as with the policy, he will also act as the advocate for FY00 EDI projects. To this end, there will not be a separate submission for FY00 EDI projects as there was this year. A copy of the guidance, procedures, and time frame for FY00 Joint Electronic Commerce Program Office (JECPO) submissions was provided to the IPT membership. Which constitutes the FY00 data call for JECPO funding of EDI initiatives.

Wrap-up: The meeting concluded with the Chairman thanking everyone for their attendance and stating that he would provide them with an electronic copy of his draft IPT findings and recommendations briefing. He further invited their comments or concerns on an informal basis.

Attendees
Adoption of Commercial EDI Standards
DoD Logistics Business Transactions, IPT, April 22, 1999

Army	*Navy*	*Air Force*	*USMC*
Mr. Carey	Mr. Minnick	Ms. Larson	Ms. Matsumoto
Ms. Dunnington		Lt Col Mihalcik	
MAJ Nelson		Maj Barnes	
		Maj Westgate	
		Ms. Richardson	
		Mr. Carlson	
NSA	*DLA*	*TRANSCOM*	*Coast Guard*
Mr. Nobles	Ms. Broussard	LTC Black	LT Copeland
	Ms. Pavlik	Mr. Freed	
		Mr. Creedon	
DFAS	*DSCA*	*NIMA*	*MEDLOG*
Ms. Abejuela	Mr. Freedenthal	Mr. Sibbet	Ms. Agnew
Ms. Hughes	Mr. Goldstein		
	Ms. Taylor		
DAASC	*JTAV*	*DISA*	*JITC*
Mr. Brown	Mr. Soechtig	Mr. Law	Mr. Lynch
Mr. Scott		Mr. Kye	
		Mr. Murphy	
DLIS	*Acq Reform*	*LCM*	*DLIS*
Mr. Behrendt	MAJ Hoeferkamp	Mr. Klovstad	Mr. Behrendt
			DLMSO/JECPO
			Mr. Yeakel
			Mr. Obey
			Lt Col Modell
			Ms. Savage
			Ms. Johnson
			Mr. Thomas
			Mr. Egan
			Mr. Crawford
			Ms. Amyx
			Mr. Kingsley
			Mr. Gower
			Mr. Lewis
			Mr. St. Mark
			Mr. Johnson

Attachment 2

Action List
Adoption of Commercial EDI Standards
DoD Logistics Business Transactions, IPT, April 22, 1999

Number	*Action/Comments*	*Suspense*	*Lead*
1-20-99-01	**Approve IPT Charter** - • IPT members will review and provide comments by 2/5/99 to Mr. Jim Lewis (project facilitator). Mr. Lewis will incorporate changes as appropriate and brief for approval at the 2/9-10/99 IPT meeting. • Incorporate changes received during previous staffing and during meeting. Post to WEB with suspense for input by 3/1/99. Present for signature to Director JECPO and DUSD(L)(LSM). Include as a briefing point at the 3/5/99 LIB. • DUSD(L)(LSM) signed Charter 3/8/99. Director JECPO signed Charter 3/12/99. Signed Charter posted to WEB.	Completed	Chairman
1-20-99-02	**Approve IPT Terms and Definitions** - • Mr. Lenny Johnson (project facilitator) will modify current terms and definitions to include source information by 1/21/99 and provide to IPT membership via the IPT web site. IPT members will review and provide comments by 2/5/99 to Mr. Johnson. Mr. Johnson will incorporate changes as appropriate and brief for approval at the 2/9-10/99 meeting. • Will continue to update IPT membership through WEB and during meetings. - Will review Charter, Plan Outline, Policy to ensure completeness of document. - Will transition to become "glossary of terms" in final Implementation Plan. • IPT Chairman will define the term DLMS to encompass other emerging EB/EC methods that may have future application to the overall EDI effort.	Ongoing Ongoing Completed	Chairman

1-20-99-03	**Approve Implementation Plan Outline** -	Completed	Chairman
	• Mr. Mark Crawford (project facilitator) will modify current Implementation Plan Outline with a sentence or two for each major heading and provide to IPT members by 1/28/99. IPT members will review and provide comments by 2/5/99 to Mr. Crawford. Mr. Crawford will brief for approval at the 2/9-10/99 meeting.		

	• Chairman will assign Action Group leads for developing the following sections of the Implementation Plan:
	  • Part 1-Introduction
	  • Part 2 – DLMS Implementation Plans
	    • New Systems (separate group)
	    • Legacy Systems (separate group)
	  • Part 3 – Implementation Management Plans
	  • Part 4 – Operation Management Plans
	  • Appendix A – Operating Concept
		Completed	

	• Tasking will include a "data call" for each of the Services and DLA to identify by name Action Group leads and support members for each formed Action Group. In addition, Chairman will name IPT Support Group facilitator(s) for each Action Group.	Completed	
	• Follow-up request sent to Services and Agencies for names of Action Group members.	Completed	
1-20-99-04	**Service and Agency EDI Briefings** - • Briefings will be provided in accordance with outline provided in administrative portion of the minutes above. Briefings by other IPT participants are optional. Time will be provided on the agenda to accommodate this option.	Completed	Services and Agencies

1-20-99-05	**DoD Logistics EDI Policy** -	Completed	Chairman
	• IPT members will review and provide comments by 2/5/99 to Mr. Jim Lewis (project facilitator). Mr. Lewis will incorporate changes as appropriate and brief for review at the 2/9-10/99 IPT meeting.		
	• Chairman will consolidate inputs, revise policy, and brief to DUSD(L)(LSM) for approval.	Completed	
	• Will research to determine preferred method to promulgate policy.	Completed	
	• Draft policy delivered to DUSD(L)(LSM) 3/8/99	Completed	
1-20-99-06	**Candidate Program/Project Funding Nominations**-	Completed	Chairman
	• IPT members will review and provide comments by 2/5/99 to Mr. Frank St. Mark (project facilitator). Mr. St. Mark will incorporate changes as appropriate and brief for review at the 2/9-10/99 IPT meeting. Based on comments and follow-on issues, Mr. St. Mark will continue to move toward final resolution/approval of programs/ projects by 3/18-19/99.		
	• IPT approved criteria with minor comments 2/10/99. Mr. St. Mark will revise criteria and issue a "data call" for nominations 2/12/99. This data call will include available funds by appropriation. Suspense for nominations will be 3/1/99. Action Group will convene 3/2-3/99 and develop a prioritized listing of nominations for presentation at the 3/4/99 IPT meeting.	Completed	
	• Prioritized listing, including new nominations received after original submission suspense was extended, will be presented to IPT 3/18-19/99	Completed	
	• Final list of approved FY99 projects presented to IPT 4/22/99.	Completed	

1-20-99-07	**IPT Voting Members** - • Chairman will revisit (based on IPT comments) the issue of IPT voting membership and reflect his findings in the next iteration of the IPT Charter.	Completed	Chairman
1-20-99-08	**DoD EDI Translator Requirements** - • Pending appointment of an "action group," IPT Chairman will begin to define/scope the DoD EDI translator requirement. This issue is inclusive of Corporate/Service/Agency requirements.	Completed	Chairman
	• 2/10/99 DLA and DISA agreed to co-chair an Action Group to define and begin the process of requirement determination.	Completed	
	• Mr. St. Mark will facilitate this action as a sub-task of the Action Group charged with developing Appendix B of the Implementation Plan.	Completed	
1-20-99-09	**IPT Non-DoD Issue Resolution** - • Develop a procedure, based on the fact that the IPT's primary focus is on DoD EDI standards, on how non-DoD (GSA, NSA, NASA, etc.) elements will assist in issue resolution.	Completed	Chairman
1-20-99-10	**Civil Sector IPT Involvement** - • Develop a procedure by which civil sector EDI standards organizations can participate, advise, and consult on the IPT's efforts**.**	Ongoing	Chairman
1-20-99-11	**DLMS/DLSS Enhancements** - • Mr. Don Egan will prepare a comprehensive list of enhancements that are present in DLMS, but not in DLSS. This list will be provided to the Chairman by 2/5/99 for review and briefed at the 2/9-10/99 meeting. • Briefing given at 3/4/99 meeting	Completed	Chairman
1-20-99-12	**NASA and USPS** - • For participation in the 2/9-10/99 meeting, the Chairman will invite NASA, USPS, and DIA to participate in the IPT process.	Completed	Chairman
2-9-99-01	**DoD ROI Studies** – • Research to determine relevant DoD logistics EDI ROI studies completed/ongoing/ contemplated and provide results to IPT	Ongoing	Chairman

2-9-99-02	**DoD Logistics priorities –** • Research to determine the relative priority of EDI migration to commercial standards within DUSD(L).	Completed	Chairman
2-9-99-03	**Migration Standard Capabilities –** • Research, compare, contrast capabilities of XML vice ANSI ASC X12, or other available logistics standards, and provide results to IPT. White paper is posted on the IPT web site.	Completed	Chairman
2-9-99-04	**IPT E-Mail Address -** • Establish an IPT "common" e-mail address. • Address established but is limited to DLA addressees – effort continues.	Ongoing	Chairman
2-9-99-05	**IPT End-State –** • Research to determine a definitive "end-state" for EDI IPT.	Completed	Chairman
2-9-99-06	**Similar Efforts –** • Research to determine if similar efforts are ongoing within DoD/Non DoD Agencies. When applicable, add link to IPT WEB page.	Ongoing	Chairman
2-9-99-07	**"Oversight Organization" –** • In what will become a recommendation of the IPT, conceptualize and propose the "oversight organization" that will serve as the follow-on to this IPT. Major responsibility will be to oversee execution of Implementation Plan.	Ongoing	Chairman
2-9-99-08	**IPT Scope –** • Assess the ramifications of expanding the implementation plan to include other enablers such as AIT, XML, e-mall etc. This action can be accomplished through the re-definition of DLMS. DUSD(L)(LSM) will be briefed on the positives and negatives of this expansion. Results will be presented at the 3/4/99 IPT meeting.	Completed	Chairman
2-10-99-01	**Other Implementation Plans/Policies –** • Research to determine other plans, strategies, policies, lessons learned, etc., that should be referenced or tied to this effort.	Ongoing	Chairman

2-10-99-02	**Testing –** • Research and develop a strategy to determine future IPT testing requirements and test agencies to be utilized (Service and/or JITC).	Ongoing	Chairman
3-4-99-01	**Training -** • Subject to request the IPT Chairman is willing to provide training on DLSS, DLMS, or other IPT-related topics for individuals or Service/Agency groups.	Ongoing	Chairman
3-4-99-02	**Agenda Topics -** • Establishment of a mechanism for IPT membership to request agenda topics for future meetings. • Added to WEB page 3/5/99.	Completed	Chairman
3-4-99-03	**Coordination -** • Coordination with the U.S. State Department and U.S. Customs Office as the IPT process moves forward. • Chairman emailed U.S. Customs POC 3/11/99 inviting their participation in the IPT.	Completed	Chairman
4-22-99-01	**EDI/AIT -** • Develop AIT information paper that provides IPT with recommendation on how IPT should proceed in light of current AIT development.	5/27/99	Chairman
4-22-99-02	**Fundamental DLMS Briefing –** • Develop a briefing with focus on what is in place to support Service and agency program managers as they implement DLMS.	5/27/99	Chairman
4-22-99-03	**Security Recommendation –** • Develop a IPT security recommendation for the use of DLMS.	5/27/99	Chairman
4-22-99-04	**Electronic Commerce Warehouse (ECW)** - Develop an "ECW white paper". Paper should outline background, current capability, applicability and vision of the future to include security ramifications.	5/27/99	DISA